



Freedonia Focus Reports
US Collection

Plastic Pipe: United States

June 2022



CLICK TO ORDER
FULL REPORT **BROCHURE** CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
COVID-19 & Inflation Impacts	6
Sustainability Initiatives	7
3. Segmentation & Forecasts	9
Resins	9
Polyvinyl Chloride	11
High-Density Polyethylene	11
Cross-Linked Polyethylene	12
Chlorinated Polyvinyl Chloride	12
Other Resins	13
Markets	15
Potable Water	16
Storm & Sanitary Sewer	17
Conduit	18
Drain, Waste, & Vent	20
Other Markets	20
4. Industry Structure	23
Industry Characteristics	23
Market Share	24
JM Eagle	25
Advanced Drainage Systems	25
Atkore International Group	26
5. About This Report	27
Scope	27
Sources	27
Industry Codes	28
Freedonia Methodology	28
Resources	30

List of Tables & Figures

Figure 1 Key Trends in US Plastic Pipe Demand, 2021 – 2026	3
Figure 2 US Plastic Pipe Demand Trends, 2011 – 2021	4
Table 1 Key Indicators for US Plastic Pipe Demand, 2011 – 2026 (US\$ bil)	5
Figure 3 US Plastic Pipe Demand by Resin, 2011 – 2026 (US\$ bil)	9
Table 2 US Plastic Pipe Demand by Resin, 2011 – 2026 (US\$ mil)	9
Figure 4 US Plastic Pipe Demand by Resin, 2011 – 2026 (%)	14
Figure 5 US Plastic Pipe Demand by Market, 2011 – 2026 (US\$ bil)	15
Table 3 US Plastic Pipe Demand by Market, 2011 – 2026 (US\$ mil)	15
Figure 6 US Plastic Pipe Demand by Market, 2011 – 2026 (%)	22
Figure 7 US Plastic Pipe Market Share by Company, 2021 (%)	24
Table 4 Selected Suppliers to the US Plastic Pipe Market	25
Table 5 NAICS & SIC Codes Related to Plastic Pipe	28

About This Report

Scope

This report forecasts to 2026 US plastic pipe demand in nominal US dollars at the manufacturer level. Total demand is segmented by resin in terms of:

- polyvinyl chloride (PVC)
- high density polyethylene (HDPE)
- crosslinked polyethylene (PEX)
- chlorinated polyvinyl chloride (CPVC)
- other resins such as fiberglass, acrylonitrile-butadiene-styrene (ABS), and polypropylene

Total demand is also segmented by market as follows:

- potable water
- storm and sanitary sewer
- conduit
- drain, waste, and vent
- other markets such as industrial processing, oil and natural gas, and irrigation

To illustrate historical trends, total demand is provided in annual series from 2011 to 2021; the various segments are reported at five-year intervals for 2011, 2016, and 2021.

Although distinctions are sometimes made between pipes and tubes, for the purposes of this report the terms “pipe”, “tube”, and “tubular products” are used interchangeably. Fittings are excluded from the scope of this report. Additionally, pipe lining and relining is not counted in this report.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Plastic Pipe: United States (FF60034) is based on *Pipe Products & Markets*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers

- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Plastic Pipe

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
326122	Plastics pipe and pipe fitting manufacturing	3084	Plastics pipe

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term

historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Pipe Products & Markets

Freedonia Industry Studies

Behind-the-Wall Plumbing

Commercial Refrigeration Equipment

Consumer Water Treatment

Global Commercial Refrigeration Equipment

Global Food Processing Machinery

Global Housing

Global HVAC Equipment

Global Industrial Valves

Global Plastic Pipe

Global Plumbing Products

Global Prefabricated Housing

Global Pumps

Insulated Wire & Cable

Plumbing Fixtures & Fittings

Precast Concrete Products

Prefabricated Housing

Water Features for Landscaping

Freedonia Focus Reports

Commercial Building Construction: United States

Construction: United States

COVID-19 Market Impact Analysis

Crude Petroleum: United States

Energy: United States

Fabricated Metal Products: United States

HVAC Equipment: United States

Manufacturing: United States

Natural Gas: United States

Plastic Foams: United States

Polyethylene: United States

Polypropylene: United States

Polyvinyl Chloride: United States

Steel Mill Products: United States

Transport Equipment: United States

Waste Management: United States

Water: United States

Freedonia Custom Research

Trade Publications

Chemical Week

ICIS Chemical Business

Journal of Light Construction

Oil & Gas Journal

Pipeline & Gas Journal

Plastics News

Trenchless Technology

Agencies & Associations

Alliance for PE Pipe

American Chemistry Council

Federal Energy Regulatory Commission

Fiberglass Tank & Pipe Institute

National Association of Home Builders

Plastic Pipe and Fittings Association

Plastics Pipe Institute (a division of the Society of the Plastics Industry)

Uni-Bell PVC Pipe Association

United States Census Bureau

United States Department of Agriculture

United States Energy Information Administration

United States Environmental Protection Agency

United States International Trade Commission